

Moor to Sea – Looe Valley Heritage
BRIEF – PROJECT MANAGEMENT
July 2020

Looe Development Trust are seeking to let a contract to manage a new project **Moor to Sea – Looe Valley Heritage**, for which the Trust will be the Accountable Body. The project will take place over 2+ years from September 2020 to December 2022 and project management is a part time commitment over that period. The project has successfully secured funding from the National Lottery Heritage Fund and other local and national funders, but because of delay and disruption caused by Covid 19, requires additional match from two sources from whom we expect to hear before the end of August 2020, before the funding package is complete. Any contract will only be confirmed once funding is secured.

A brief summary of the background to this project and our requirements is given below.

Summary of the project

The project will engage local people in the Looe Valley in the heritage of their area and build partnerships and capacity among local heritage organisations. It is part of a wider initiative to open access to the valley's heritage through a new network of cycling and walking trails, the construction of which is being taken forward by Cornwall Council in parallel with this project.

This project has emerged as a next step from three years of feasibility study activity associated with the development of the Looe Valley Trails, conducted by Looe Development Trust. This work included the creation of a research-informed heritage activity plan and an assessment of the historic landscape and natural environment. Emerging from this, the heritage focus for **Moor to Sea** is:

- The canal and railway which were the industrial highway connecting the Caradon Area of the Cornish Mining World Heritage Site with the port of Looe.
- Rural heritage especially agricultural and social history.
- Landscape and environmental change (including climate) due to human activity.

The project is focused on community engagement through four activity strands:

- Valley Stories - partnering with local museums to train volunteers to undertake historical research, gather oral history and produce a touring exhibition.
- Environmental Explorers - partnering with local environmental groups to engage local people and schools in citizen science projects and an events programme.
- The Moorswater Story - training volunteers to research and create walking trails exploring the industrial archaeology and social history at this key historic transport interchange for the Cornish Mining World Heritage Site.
- Celebrating the Looe Valley - working with local creative and performing arts groups to co-produce events for a Looe Valley Festival in summer 2022 celebrating the valley's heritage.

Our target audiences include schools, young people, the unemployed, local adults and tourists.

The project is intended to meet the following National Lottery heritage Fund outcomes:

- A wider range of people will be involved in heritage
- Heritage will be identified and better explained
- People will have learnt about heritage, leading to change in ideas and actions
- People will have developed skills
- The funded organisation, and the project partners, will be more resilient

The project will report to a Steering Group of local stakeholders and funders including Cornwall Council, the Cornish Mining World Heritage Site, Devon and Cornwall Rail Partnership, local museums and local town councils.

The proposed approach

Looe Development Trust require a project management contractor to take full responsibility for the delivery of the project to a high standard, meeting the requirements of funders and the local community and delivering to time and budget. We are also seeking a financial administration assistant (separate brief) to support the project manager and we are open to combined (team) or individual approaches for these roles.

We have set out a proposed project plan which is attached to this brief. This sets out in more detail the activities we envisage will be required to deliver the project as a whole and what will be involved in the delivery of each strand. This project plan is included in our funding bids. Some further work will be required at the start of the project to finalise a delivery plan that responds to the new and emerging requirements resulting from the Covid 19 pandemic.

Key to our approach is the principle of co-creation, in that we expect the project manager to work with the local community and local organisations to agree the activities that will be undertaken within each project strand and then coordinate the delivery of these activities into a coherent programme. We recognise that this means that some of the details may evolve during the course of the project, but we expect that delivery of the overall strands, participation and outcome targets and the National Lottery Heritage Fund outcomes will be met.

Co-creation will be particularly important to the **Celebrating the Valley** strand, where we envisage a process of working with local community arts and other organisations to develop an interesting and engaging Festival programme to be delivered in summer 2022. A small community grants budget will be available to facilitate delivery by participating organisations.

We have already agreed some of the local partners that will work with us to deliver this project – local museums, the Friends of Kilminorth Woods, local heritage interest groups, the community rail partnership – and have expressions of interest from others including schools and arts organisations. These relationships will need to be developed during the project.

We have particular targets within the project to involve young people and the long term unemployed, and the project will engage with local schools, youth organisations and community support organisations to achieve this. The budget includes funding to support local travel and subsistence for these groups to remove barriers to their participation.

As well as delivering the range of practical activities set out in the plan, the project manager will lead on developing wider community engagement with the heritage of the valley through a proposed Looe Valley Heritage Forum. It is our aim that this will lead to the creation of a new and long-lasting area-based partnership which can take forward future activity after the end of this project. This capacity building and partnership development will be an important legacy of the work.

The project manager will be responsible for setting up and maintaining a range of communications mechanisms to generate wider awareness of, support for and involvement in the project's activities. To this end, an early task will be to procure professional support on graphic design and website development and a budget has been set aside for this. Funders will require acknowledgement of their contributions in key external communications.

Finally, the project manager will be required to develop and implement an evaluation framework for the project, as a basis for regular reporting to the Steering Group and interim and final reporting to funders. This work should run throughout the project so that it can both inform how the work develops and act as a summative evaluation at the end.

Consultancy brief - Project Management

This role is subject to funding

Purpose

The purpose of this consultancy is to ensure successful delivery of the Looe Valley Heritage project on behalf of Looe Development Trust.

Reports to

The project manager reports to the Board of Trustees of Looe Development Trust, through the Chair. The project is guided by a Steering Group to whom the project manager will report regularly.

Key objectives

The project manager will have overall responsibility for all aspects of project management and delivery including management of museums partnership activity, volunteer mentoring, training and supervision, coordination and delivery of the environmental explorers programme, interpretation lead for the Moorswater trail and development and delivery of the Festival programme. The project manager will also facilitate the creation of a new Looe Valley Heritage Forum and seek to develop this into a new landscape partnership organisation to continue after the project has ended.

Specific objectives include

- Direct delivery of programme and strand activities including overseeing the work of other individuals engaged to support the project (as set out in the project plan), to time and budget
- Engaging local communities and organisations, including target groups
- Ensuring effective communications
- Managing the inputs of volunteers and other professional staff
- Engaging and shaping the involvement of other stakeholders
- Partnership development, particularly with respect to the Forum and landscape partnership
- Leading on preparation of the final project report
- Informing and responding to the views of the project Steering Group, including by organising and minuting meetings
- Ensuring compliance with funders' requirements and making timely and accurate claims and reports to funders, supported by a part-time bookkeeper/project administrator

Knowledge, experience and skills required

This is a broad brief and we recognise that it might be met either by a single individual or a small team (in the latter case, a clear lead consultant will need to be identified with whom LDT will contract). The following range of knowledge, experience and skills will be required:

- Experience of the effective management and delivery of heritage and community projects including managing volunteers
- Strong people skills to secure the engagement of a wide range of groups and individuals, and within this a track record of working to increase inclusion
- Heritage expertise to be able to provide leadership in this area within the project, including working with accredited museums

- Environmental expertise to be able to lead the landscape heritage activities in the Environmental Explorers strand
- Experience of partnership development to use this project to build the capacity of local heritage organisations, establish the Forum and facilitate development of the legacy organisation
- Experience of formative and summative evaluation to the standard required by National Lottery Heritage Fund and other funders
- Strong financial management with a track record of delivering projects to time and budget
- Good knowledge of the local context, stakeholders, and local communities
- Networking and communication skills, including the ability to support purposeful meetings and produce high quality written reports

Time commitment and budget

We hope that the project will commence in September 2020 and be completed by December 2022. Some slippage is possible if funding decisions are delayed and we will expect proposals to be valid until December 2020.

We have allocated an overall project management fee of £48,900. This envisages the appointment of an experienced project manager/team who is able to work quickly and effectively to drive delivery of the project; the ability to make a quick start in September when funding is agreed is essential. VAT, if applicable, must be included in this figure. Up to £2,000 to meet travel costs and expenses are available in addition.

Payment will be made quarterly in arrears on submission of invoices and subject to satisfactory progress of the work programme.

This is a part time role and the project manager will need to be flexible in relation to availability within the overall time allocation and budget for the project.

Application process

Please send a short proposal on no more than 3 sides of A4 (11 pt font) with details of how you meet the requirements of this brief and any particular aspects of your proposed approach that you wish to draw to our attention. Your proposal should include a clear indication of the number of days and daily fee rate of staff proposed. The cvs of all key staff proposed should be appended, each on no more than 2 sides of A4. The names and contact details of two recent, relevant clients willing to provide references should also be included. Email submission is acceptable with documents in standard Word format.

Proposals will be assessed by the Trust on the basis of:

- Understanding of the requirements of the brief
- Relevant experience of proposed staff
- Value for money (days and daily rate)

We expect to make an appointment based on written proposals and not to conduct interviews prior to identification of the preferred bidder.

Submissions and any enquiries should be made to:

Justin Spreckley
Chair
Looe Development Trust
The Millpool Centre
West Looe PL13 2AF

e-mail address: ldt.looe@btinternet.com

The deadline for applications is: **27 August 2020**

We will identify a preferred candidate with the contract to be confirmed once funding is in place, which we anticipate to be in late August or early September 2020. Bidders must confirm their availability on this basis, noting that we wish to provide for the possibility of slippage up to December 2020. Our preferred bidder will be contacted by telephone within 10 working days of the application deadline, and unsuccessful bidders will be informed by email subsequently. We are sorry but we do not have the capacity to give detailed feedback to unsuccessful bidders.

ATTACHED:

1. Project Plan (excel)

Moor to Sea – Looe Valley Heritage
BRIEF – financial administration assistant
July 2020

Looe Development Trust are seeking to let a contract to provide financial administration support to a new project **Moor to Sea – Looe Valley Heritage**, for which the Trust will be the Accountable Body. The project will take place over two years from September 2020 to December 2022 and financial administration is a part time commitment averaging 1 day per month over that period. The project has successfully secured funding from the National Lottery Heritage Fund and other local and national funders, but because of delay and disruption caused by Covid 19, requires additional match from two sources from whom we expect to hear before the end of August 2020, before the funding package is complete. Any contract will only be confirmed once funding is secured.

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The project will report to a Steering Group of local stakeholders and funders including Cornwall Council, the World Heritage Site, Devon and Cornwall Rail Partnership, local museums and local town councils.

The proposed approach

Looe Development Trust will appoint a project management contractor to take full responsibility for the delivery of the project to a high standard, meeting the requirements of funders and the local community and delivering to time and budget. A financial administration assistant is required to support the project manager in keeping accurate financial records of grant income and project payments, to assist with the process of making grant claims. We are open to the possibility of a joint (team) proposal for both roles.

Looe Development Trust will be the Accountable Body for the project and will therefore receive all funds and make any payments required, as authorised by the project manager. Good liaison between the financial administration assistant and the Looe Development Trust manager, who is responsible for the Trust's day to day operations, is therefore also essential.

This is a part time commitment of 7.5 hours per month and will be appointed through a contract for services (self-employed).

Strong organisation skills, numeracy and attention to detail are required, together with competency in maintaining records through simple excel spreadsheet or another accounting software platform. We do not require specific skills or experience in project finance as the role will be supervised by the project manager who will be responsible for the submission of grant claims. As such, the role may suit someone with good general administration skills wishing to gain experience in an entry-level finance role.

Consultancy brief – financial administration support

This role is subject to funding

Purpose

The purpose of this role is to support the project manager's successful delivery of the Looe Valley Heritage project on behalf of Looe Development Trust, by keeping accurate and timely financial information.

Reports to

The financial administration assistant reports to the project manager who will provide supervision.

The Looe Development Trust / Millpool Centre Manager is a key contact.

Key objectives

The financial administration assistant will be required to maintain full, accurate and timely records of all project income and expenditure

Specific objectives include

- Ensuring all grant income is logged on receipt so that cash flow can be monitored
- Checking and recording all claims for expenditure, including contractor invoices, and passing these to the project manager for approval.
- Liaising with Looe Development Trust to ensure timely payment of invoices and claims
- Assisting the project manager to prepare regular financial reports, including quarterly reporting to Looe Development Trust and grant funders as and when required
- Assisting the project manager to prepare financial aspects of grant funding claims
- Assisting with the administration of a Community Grants Fund which will allocate small grants to community organisations participating in the project

Knowledge, experience and skills required

This role will suit someone with good general administrative skills wishing to gain financial administration experience. The following range of knowledge, experience and skills will be required:

- Strong organisational skills and attention to detail
- Numeracy
- Ability to work with excel spreadsheets or an accounting software package if preferred
- Flexible and calm under pressure
- Good communicator, able to establish good working relationship with the project manager and others involved in the project

Note that there is no requirement to attend meetings or be present at Looe Development Trust offices. The role could be carried out remotely using electronic communications.

Time commitment and budget

We hope that the project will commence in September 2020 and be completed by December 2022. Some slippage is possible if funding decisions are delayed and we will expect proposals to be valid until December 2020.

We have allocated an overall financial administration fee of £2,240, equating to one day per month for two years and 4 months at a day rate of £80 per (7.5 hours) day; this time is likely to be spread across several days during the month and recorded on an hourly basis. This envisages the appointment of an entry-level administrator. VAT, if applicable, is included in this figure. We do not envisage expenses will be required.

Payment will be made quarterly in arrears on submission of invoices and subject to satisfactory performance.

This is a part time role and the administrator will need to be flexible in relation to availability within the overall time allocation and budget for the project.

Application process

Please send a short cv on no more than 2 sides of A4 (11 pt font) with details of how you meet the requirements of this role. The name and contact details of one recent, relevant client or employer willing to provide references should also be included. Email submission is acceptable with documents in standard Word format.

Proposals will be assessed by the Trust on the basis of how well applicants meet the skills and experience required. We expect to make an appointment based on CVs and not to conduct interviews prior to identification of the preferred candidate.

Submissions and any enquiries should be made to:

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